Automated Case Directory

Draft Requirements Document

WISDOM

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Section I: Introduction

I. Introduction

Overview:

The Department of Health and Family Services (DHFS), the Department of Workforce Development (DWD) and the WISDOM Development Team conducted a series of Joint Application Development (JAD) sessions to gather the requirements for an **Automated Case Directory** for use by the Agency Workers. The survey conducted by DHFS during the winter of 2002 was used as the primary input for the JAD. The requirements were further refined to fit the needs of both DWD and DHFS.

Purpose:

The Automated Case Directory involves building a Data Warehouse and creating Reports to meet the following goals:

- Replace the existing paper based Case Directory Report, which is costly to print and distribute to the agencies.
- Better serve the needs of the intended users.
- More frequent (weekly) data refresh. Currently the Case Directory Report is produced monthly.

Team:

DHFS

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WISDOM Team

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Design Considerations and Assumptions:

- Workers should have access to predefined Web Intelligence reports which will be easy to navigate, print and export to excel without much training. Self-learning Training materials will be made available. The Business Objects Universes will not be accessible to the workers. However it will be available for Central Office lead users.
- Workers will have query capabilities on basic demographic information about case and individuals.
- Business Objects security will be imposed on Confidential Cases and other elements to maintain confidentiality.
- A new extract will be created to answer all the business questions.
- Depending on the number of users, Web Intelligence stress testing, training needs (train-the-trainer or training support tools) and help desk enhancements will be addressed separately.
- Data will be refreshed on a weekly basis. No history data will be loaded. Only the data as of the end of the last week will be available.

Business Questions:

The requirements were documented as business questions in a matrix format (**see Section II**). Around 19 questions were identified for the Phase I implementation and 8 questions were identified for the Phase II implementation. These were classified based on their complexity and the size of the requirement.

Universes:

The business questions have been decomposed into universes, dimensions and measures (see **Section III**). The data will be organized into three Universes: Case, AG and Individual. Most of the questions are answered at either the Case or Individual level. A few questions related to program and sub program are addressed at the AG level.

Work Plan:

Business requirements started in early June 2003 and currently the requirement phase is nearing completion. Project is scheduled for implementation by October 17, 2003. See **Section IV** for a detailed Work Plan.

Section II: Business Questions

Section III: Initial Universe Design

Section IV: Work Plan

Appendix A: Sample Query Screen

Appendix B: Sample Report Layout